PURCHASING USER MANUAL 1

RECEIVING... 1

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RECEIVING

INTRODUCTION

The Receiving **Status** screen displays purchase orders that have been saved in the application and allows you to find purchase orders by several criteria. The receiving personnel are able to:

- Select purchase orders to record the items received.
- Record which items are received.
- Record any back-ordered, missing, broken, or unavailable items.
- Print any receiving documents or reports.

Figure 1 - Receiving Status screen

TO VIEW THE PURCHASE ORDER STATUS LIST

The list of purchase orders is organized by column headers to show the following information:

- **PO #**. The purchase order number (if the purchase order has been marked as ordered).
- **Required By**. The Required Delivery date (if entered on the purchase order).
- **Vendor**. The vendor name (if one was entered).
- **Status**. The status of the purchase order.

To sort the list, click a column header to sort by. For example, click **Vendor** to sort by the vendor names in alphabetical order.

TO ENTER RECEIVING INFORMATION

1. On the **Status** screen, click **Select** next to a purchase order.
2. The purchase order items will be displayed on the **Receiving** screen.

Figure 2 - Receiving screen

3. Review the purchase order to compare it to the items received.
    - Review the line item details on the receiving screen for **Item #**, **Description**, quantity (**Qty**), **Unit**, and **Price** (if your agency has enabled prices to be displayed on the **Receiving** screen)
    - Click **Preview** next to a line item if you want to view and/or print the line item details in PDF format.
    - Click **Print Preview RCVG** if you want to view and/or print the purchase order details in PDF format.
4. Check the **Rcv** check box next to each line item received that matches the purchase order and then click **Receive** to mark all items received.
5. If any items received do not match the purchase order, click **Select** next to the line item.
    a. Enter the receiving information on the **Receive Item** window.

Figure 3 - Items missing

    b. Enter the **Actual Receiving Date** (or click the calendar icon to select a date).
    c. Select a reason why the items received do not match the purchase order – **Something is missing**, **Something is broken**, or **Something is**

backordered/partial receipt, or **Something is not available**. (You will be able to select only one. If you receive a shipment that has items broken and items backordered, select **Something is missing** and add **Notes** for explanation.)

d. Enter the actual **Quantity Received**.

e. Click the line item **Notes** icon to add explanatory notes, e.g., why items were not received or why items were returned, etc.

f. Click **OK**.

g. Click **Done**. The line tem will be split on the **Receiving** screen into a line of the received items and a line of the outstanding items. Click the **Description** column header to sort the items alphabetically.

E-MAIL NOTIFICATIONS

If the agency administrator has enabled e-mail notification, an e-mail will be sent automatically when the receiver marks that something is missing, broken, backordered, or not available.

Action	E-mail recipient
Received/Something Missing	Requester/Purchaser
Broken	Requester/Purchaser
Backordered/Partial	Requester
Received (all)	Requester
Not Available	Requester/Purchaser

TO UNDO ITEMS MARKED AS RECEIVED

If you accidently mark items received that were not, click **Correct** next to the item(s), and then click **OK**. Items will revert to status of **Ordered** and you can select them for receiving when they are actually received.

Figure 4 - Correct Items Received
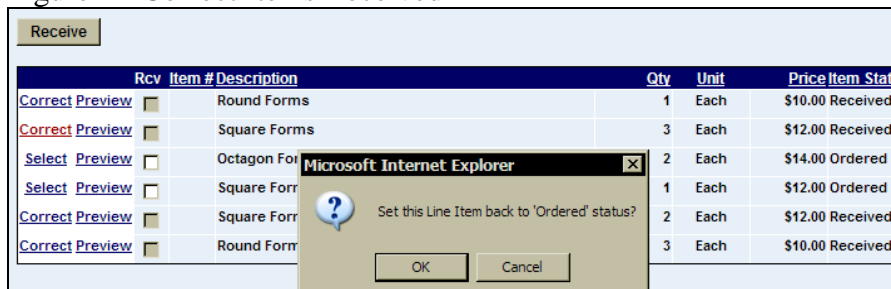
TO SEARCH FOR PURCHASE ORDERS ON THE STATUS SCREEN

1. The first section of the **Status** screen contains search criteria to find purchase orders. Select from the following:

   - **PO #**. The purchase order number.
   - **Req #**. The requisition number that a requisition item was on. Other items from other requisitions may be on a purchase order.
   - **Status**. The status of the purchase order. Select a status from the drop-down menu. (The status **Active or recently received** is for the last seven days.)
   - **Request Date Range**. The date the purchase order was created. To use this search criterion, select **All Purchase Orders** from the **Status** drop-down menu. Select a pre-defined date range or enter the date range.

2. Click **Find**.
3. To reset the search criteria to default settings, click **Reset** and then click **Find**.